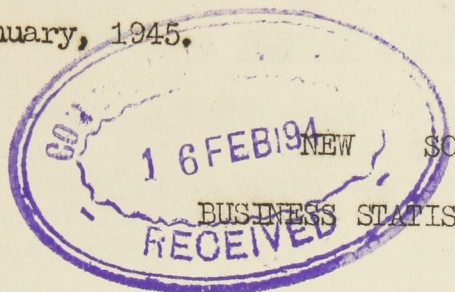


14th January, 1945.

B.S. 1945/1B.



BUSINESS STATISTICS - JANUARY, 1945.

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PART I. PRIMARY AND EXPORT INDUSTRIES.

GENERAL. Seasonal Conditions. After substantial falls earlier in the month, the Central and Eastern sections of the State received further useful falls - between an inch and $1\frac{1}{2}$ inches in north and central western slopes and central tablelands - at the end of January, 1945. The North Coast, which missed the late January falls had light to substantial falls early in February when rainfall elsewhere was negligible.

Dairy pastures have responded, but need following rains for the improvement in production prospects to be maintained. Potato and late maize crops benefited from recent rains, but many had already failed.

Conference with U.K. Farmers' Delegation. At a conference in Sydney of the United Kingdom Farmers' Delegation with the Primary Producers' Council of Australia and representatives of New Zealand farmers the principle of international federation of primary producers was accepted. The calling of a conference in London, later in the year, to formulate plans for such a federation was mooted.

Meat. Temporarily, and until restoration is warranted by better seasonal conditions, the civilian allocation of meat is to be at the rate of 530,000 tons a year, effecting a saving of 40,000 tons p.a. Australian production in 1945 is expected to be 965,000 tons compared with 1,035,000 tons in 1944. As from Feb. 26, 1945, coupon values are to be reduced in Group A from $\frac{3}{4}$ lb. to $\frac{1}{2}$ lb., in Group C from $1\frac{1}{2}$ lb. to $1\frac{1}{4}$ lb. and in Group D from 2 lb. to $1\frac{1}{2}$ lb., with value in Group B unchanged.

Rice. This season the area sown to rice on the Murrumbidgee Irrigation Areas is limited to 60 acres per grower and the total area may be less than 20,000 acres, compared with 37,400 acres last season. On the Wakool Area an increase from 4,100 acres to 4,800 acres is expected.

Eggs. From controlled production about 1000 million dozen eggs are expected to be produced in 1945. Of these only 100 m. doz. will be obtained in June Qr.,

Australian consumption is now at an allotted rate of 62 m. doz. eggs a year compared with an average pre-war recorded consumption of about 56 m. doz.

WOOL. Arrivals of wool in Sydney this season to Feb. 7 were 774,608 bales, compared with 895,387 bales in the corresponding period of last season. At this stage in 1940, arrivals were 1,150,283 bales.

Of the wool received to Feb. 7, 665,491 bales had been appraised, or 73,628 fewer bales than to that date of last season.

Figures published by the Central Wool Committee on Feb. 9, 1945, show that to date, wool appraised this season totalled 2,128,096 bales of an appraised value of £38.39 m. This compares with 2,160,000 bales and £40.35 m. at the corresponding date of last season.

The average appraised price per lb. greasy was 13.78d. for the Commonwealth and 13.45d. in N.S.W., The agreed price of purchase by the British Government is 15.453d. per lb., which applies irrespective of quality of the Australian clip. It is probable, therefore, that the end-of-season equalisation payment this season will exceed that of $11\frac{1}{4}$ per cent. made for 1943-44.

Because wheat is no longer available for feed in drought areas, sheep mortality is expected to increase.

WHEAT. The F.A.Q. standard for N.S.W. 1944-45 wheat has been fixed at 63 lbs. a bushel, compared with $64\frac{1}{4}$ lbs. a bus. last season. No grain elevators opened in the southern section of the State this season; the crop there was only $2\frac{1}{2}$ m. bus. compared with the annual average of 22 m. bus.

From stocks and new crop. the Australian Wheat Board had 100 m. bus. on Jan. 22, 1944, to meet requirements until 1945-46 wheat is available. In 1945, wheat for human consumption is expected to absorb 37.1 m. bus., inescapable export commitments are 14.7 m. bus., leaving 48.2 m. bus. for stock feed, etc. It was

revealed that supplies in N.S.W. comprised 8.2 m. bus. of new crop wheat (delivered to 27.1.45) and 13.4 m. bus. of old wheat, a total of 21.6 m. bus. Requirements in N.S.W. from Jan. 1 to Nov. 30, 1945 were 31.8 m. bus. so that 5.4 m. bus. would need to be obtained from other States (W. & S. Aust.)

It has been announced that no quota will apply to 1945 plantings by registered wheat growers. There is to be a first advance and guaranteed price of 4s. 3d. a bus. for all bagged wheat delivered at sidings by registered growers. (In 1944-45 the guaranteed price of 4s. 1.33d. a bus. applied only to the first 3,000 bus. delivered by each grower, and for wheat in excess of that quantity a first advance of 3s. a bus. was paid.)

Final estimate of the Western Australian 1944-45 harvest is 15.5 m. bus. - 1³/₄m. bus. above the earlier forecast, but 1 m. bus. smaller than the 1943-44 harvest.

WORLD STOCKS. Poor harvests in Australia and Argentina (the latter now estimated at 156.1 m. bus. compared with the average crop of 261 m. bus. in 1943-44) have been offset by abundant production in the United States and Canada in 1944. In these four countries stocks at July 1, 1945, may be about 1,140 m. bus. of which about 700 m. bus. may be available for export. Stocks in these countries at July 1, were estimated to be 1,750 m. bus. in 1943, and 1,170 bus. in 1944 - heavy in comparison with the 1935-39 average of 457 m. bus.

DAIRYING INDUSTRY. Showing effects of the drought, production of butter in N.S.W. in December, (7.5 m. lbs.) and in the six months ended December, 1944 (35.1 m. lbs.) was smallest for that month and half year for many years. Compared with the preceding year the decreases were of the order of 43 and 22 per cent. respectively. Following rains in January, some improvement in production is now occurring.

BUTTER PRODUCED - N.S.W. FACTORIES.

000,000 lb.

Period	Average '37-8/'39-40	1940/41	1941/42	1942/43	1943/44	1944/45
August	5.5	5.0	4.6	5.3	3.3	3.1
September	7.1	6.5	5.9	6.0	4.9	5.4
October	10.1	8.0	7.5	7.5	8.6	8.5
November	13.1	8.2	7.9	11.3	11.6	8.2
December	13.5	11.4	8.6	12.0	13.1	7.5
Total 6 months	54.2	44.1	39.1	47.3	44.8	35.1
Balance of Year	59.7	59.6	46.0	46.5	43.1	...
Year	113.9	103.7	85.1	93.8	87.9	...

PART II. FINANCE AND TRADE.

GENERAL. Cabinet re-organisation early in February, 1944, made the Minister for War Organisation of Industry, also Minister for Post-War Reconstruction (in place of the Treasurer). Fusion of these Departments is being arranged. A new Ministry of Works was also created.

New diplomatic positions have been created by the appointment of a Minister to France and a Minister at Large for South America.

Economic Policy. In outlining the Government's post-war policy on Feb. 5, 1944, the Prime Minister stated that the aim would be to secure the highest possible level of employment and the use of resources to raise the standard of living, develop productive capacity, and adequately to provide for defence. Reliance for speedy resumption of normal production and industrial development would rest largely upon private enterprise. It would be necessary to retain control over prices and costs, oversea expenditure, and initially, over building activities. The Government will retain and operate key war plants but invites private enterprise to submit propositions for those not to be retained. Oversea trade is to be fostered, sound industries given reasonable protection, research is to be enlarged and encouraged and the Tariff Board is to continuously investigate the efficiency of protected industries. Taxation is to be reviewed as circumstances permit.

Maintenance of total expenditure is accepted as the key to full employment. The Government will aim to ensure that expenditure of individuals, business and Governments will be maintained at a level to supply purchasing power for the maximum possible output of the economy. Manufacturers are asked to advise as to their post-war plans for capital expenditure.

At the Secondary Industries Conference (Feb. 5 and 6), (where the announcement of economic policy was made), proposals were accepted in principle by the Chamber of Manufacturers.

Demobilisation. It has been officially disclosed that the re-establishment and Employment Bill will provide for a system of demobilisation in which age, length of service and marital status mainly will determine the order of discharge. It is expected that some 500,000 men and 40,000 women will await discharge, and that many thousands in war jobs will need to be re-absorbed in civilian industry. It is hoped to complete demobilisation in progressive stages within twelve to eighteen months after the war ends.

OVERSEA TRADE - Australia. Figures released by the Commonwealth Statistician covering "Civil" trade - which are reasonably comparable with pre-war trade figures - and Total trade - including munitions, etc. - show that in the six months ended December, the value of civil exports was £ stg. 600,000 greater, and of civil imports £ stg. 1,130,000 less in 1944 than in 1943. In civil trade exports and imports were £ stg. 8 m. and £ stg. 9.4 m. respectively less than in the half-year ended December, 1938. In July-Dec., 1944 civil exports exceeded civil imports by £ stg. 1.73 m. (there was an excess of imports of £ stg 3,000 in July-Dec., 1943) compared with a commodity balance of £ stg. 210,000 in the half year ended Dec., 1938.

In total trade (including war goods) and comparing July-Dec., of 1944 and 1943 there was an increase in 1944 of £ stg. 6.7 m. in exports and a decrease of £ stg. 26.5 m. in imports.

OVERSEA TRADE - AUSTRALIA.

Particulars	Civil Trade.				Total Trade.	
	Half-year ended December.					
	1937.	1938.	1943.	1944.	1943.	1944.
Merchandise	Value in £ stg. million,					
Exports	56.40	50.95	42.38	42.99	54.13	60.80
Imports	56.79	50.74	42.39	41.26	117.49	90.96
Commodity Balance	(-).39	.21	(-) .003	1.73	(-)63.35	(-)30.16

The greater part of civil trade in the latest half year was with British countries (exports about 70% and imports about 60%) but because of the predominance of the United States as supplier of war materials to Australia, the Empire's proportion of total imports was reduced to 57% whereas British countries absorbed about 73% of total exports. (Note: In comparing present and pre-war values account should be taken of the currently higher level of prices).

IMPORT POLICY. Commonwealth sponsorship of imports from the United States has ended. Instead, the American supplier must make the case to the Foreign Economic Administration, and he will be dependent upon the Australian import licensee for essential data of the need for and purpose of goods ordered.

SAVINGS BANKS. During December, 1944, depositors added to their balances £2.4 m. in New South Wales and £6.2 m. in Australia compared with additions of £3.8 m. and £10.2 m., respectively in December, 1943.

In the half year ended December, £16.3 m. in N.S.W. and £45.15 m. in Australia were added to depositors balances in 1944. The corresponding increases in 1943 were £19.7 m. and £56.3 m. respectively.

At December 31, 1944, the number of operative Savings Accounts in Australia was 5,117,000 or 317,000 more than a year earlier. In N.S.W. the number was 1,768,000 having increased 134,000 during the year 1944.

SAVINGS BANK DEPOSITS: N.S.W. AND AUSTRALIA.

Period.	N.S.W.		AUSTRALIA.	
	Deposits at end of period	Increase or Decrease (-) in period.	Deposits at end of period	Increase or Decrease (-) in period.
<u>Year ended June:</u>	£000	£000	£000	£000
1939	87,474	1,458	245,587	5,155
1941	87,750	5,639	252,231	15,240
1942	84,538	6,788	274,275	22,044
1943	122,405	27,867	357,995	83,720
1944	162,867	40,462	471,534	113,539
Month: 1943 Sept.	134,163	3,644	392,140	10,125
Oct.	136,326	2,163	398,587	6,447
Nov.	138,328	2,002	404,068	5,481
Dec.	142,109	3,781	414,298	10,230
1944 Sept.	173,037	2,934	500,021	8,355
Oct.	173,981	944	503,049	3,028
Nov.	176,748	2,767	510,463	7,414
Dec.	179,128	2,380	516,685	6,222

WAR SAVINGS CERTIFICATES. Net proceeds of sales of War Savings Certificates in Australia in December, 1944, were £586,000 of which £219,000 accrued in New South Wales. These amounts compare with £882,000 and £357,000, respectively in December, 1943. In July-December of successive years 1941 to 1944 net proceeds were:- In N.S.W., £1.32 m., £1.77 m., £1.85 m., and £1.53 m., and in Australia, £3.94 m., £5.10 m., £4.98 m. and £4.21 m.

Lower purchases of War Savings Certificates now as compared with 1942 are probably due to drives for small investors in War Loans - loan instalments replacing the buying of Certificates.

NET PROCEEDS OF SALE OF WAR SAVINGS CERTIFICATES
N.S.W. AND AUST.

	July, '44	Aug. '44	Sept. '44	Oct. '44	Nov. '44	Dec. '44	July '44 to Dec. '44.	Total to Dec. '44.
			Thousand £					
N.S.W.	275	268	212	220	336	219	1,530	17,220
AUST.	730	777	575	657	882	586	4,207	47,928

NOTE ISSUE. Australian Notes in the hands of the public in December, 1944, averaged £181.4 m. compared with £147.2 m. in Dec., 1943 and £176.6 m. in July, 1944. Thus, after increasing £29.4 m. in the first seven months, notes in the hands of the public rose only £4.2 m. in the last five months of 1944. Part of of the latter increase was seasonal in incidence. Between November 29 and January 24, 1943-44 there was a seasonal expansion of £12.1 m. followed by a return of £3.9 m. - a net increase of £8.2 m., but this year, between Nov. 27 and Jan., 22 the expansion of £6.9 m. was followed by a return of £11.2 m. - a net reduction of £4.3 m. over the period.

It would appear that the rising trend of the war period was arrested and tended to be reversed slightly late in 1944. Amongst contributory factors would be the transfer from Australia of U.S. servicemen and effects of the drought.

AUSTRALIAN NOTES HDLD BY PUBLIC.

£ million	End of Month (Approx.)				1943-44			1944-45		
	Dec. '39	Dec. '40	Dec. '41	Dec. '42	Nov. '29	Dec. '27	Jan. '24	Nov. '27	Dec. '25	Jan. '22
	44.3	57.2	67.2	109.6	137.9	150.0	146.1	180.3	187.2	176.2

RETAIL TRADE. In a group of large retail stores in Sydney the value of sales in November, 1944 was 10.6 per cent. greater than in Nov. 1943, following decreases of 1.7% and 16.3% comparing Nov., 1943 with Nov., 1942 and Nov., 1942 with Nov., 1941, respectively. In the eleven months ended November, sales were 2.9% greater in value in 1944 than in 1943, but apparently some 11 per cent. below the value in 1941. Having regard also to the higher price level, it is evident that the physical volume of turnover in these shops is materially below that attained in the early phase of the war.

Stocks were 4.4% greater in value than in November, 1943, when in turn the value was 10.1% less than in November, 1942.

RETAIL TRADE - EXPERIENCE OF LARGE SYDNEY STORES.

Percentage Increase (+) or Decrease (-) from corresponding period
previous year.

	June	July	August	Sept.	Oct.	Nov.	Eleven months ended November.
Value of Sales.							
1941	(+) 38.4	(+) 10.5	(+) 16.3	(+) 20.5	(+) 18.1	(+) 7.4	(+) 15.9
1942	(-) 19.1	(-) 15.6	(+) 5.7	(-) 7.0	(-) 17.3	(-) 16.3	(-) 3.0
1943	(-) 1.3	(-) 25.5	(-) 20.7	(-) 11.5	(-) 9.9	(-) 1.7	(-) 13.0
1944	(+) 2.7	(+) 3.8	(+) 11.8	(+) 3.7	(+) 5.6	(+) 10.6	(+) 2.9
Value of Stock.							
1941	(+) 1.4	(+) 11.1	(+) 9.5	(+) 10.5	(+) 13.9	(+) 16.2	(+) 6.8
1942	(+) 10.5	(+) 14.7	(+) 13.4	(+) 5.9	(+) 2.1	(-) 1.2	(+) 10.0
1943	(-) 10.2	(-) 7.7	(-) 11.4	(-) 10.0	(-) 9.1	(-) 10.1	(-) 6.3
1944	(+) 0.8	(-) 0.4	(+) 4.2	(+) 5.0	(+) 4.3	(+) 4.4	(-) 0.6

As in recent months, a comparison of trading in November, 1944, with November 1943 showed large increases for wearing apparel (except footwear) with increases of 35.7% for dress piece goods, 14.4% for women's wear and 6.5% for men's and boys' wear. The furniture group increased by 13.3%, hardware by 18.5% (despite a decrease of 1.3% for building materials), food and perishables by 10.1% and miscellaneous by 19.6%.

Stocks generally were higher in value than in Nov., 1943, with major exceptions of boots and shoes (-21.5%) and the furniture group (-8.3%).

RETAIL TRADE - SALES BY LARGE SYDNEY STORES.

Percentage movement from same month in preceding year.

Month	Wearing Apparel.				Household Piece Goods	Furniture and Hardware
	Dress Piece Goods	Women's Wear	Men's & Boys' Wear	Boots & Shoes		
1943-Nov.	(+) 29.4	(+) 15.0	(+) 9.2	(+) 11.4	(-) 29.7	(-) 27.6
1944-June	(-) 0.6	(+) 5.5	(+) 5.7	(+) 4.7	(+) 0.2	(+) 1.9
July	(+) 12.0	(+) 10.2	(+) 3.2	(+) 8.5	(-) 0.9	(+) 1.9
Aug.	(+) 29.1	(+) 13.2	(+) 14.2	(+) 9.2	(-) 6.5	(+) 10.7
Sept.	(+) 23.8	(+) 6.7	(+) 7.5	(-) 7.1	(-) 8.5	(-) 0.8
Oct.	(+) 29.3	(+) 7.7	(+) 6.2	(-) 5.2	(+) 3.4	(+) 3.3
Nov.	(+) 35.7	(+) 14.4	(+) 6.5	(-) 1.7	(+) 0.6	(+) 11.5

PART III INDUSTRY: TRANSPORT, ETC.

GENERAL. M manpower. War Cabinet decided (9.2.45) that there could be no significant re-allocation of manpower in the near future. It was stated that Australian services for the British Pacific Fleet would require use of services no longer required by U.S. naval units and considerable additional manpower besides.

Munitions Programme. Feeder munitions plants at Parkes, Forbes, Wellington, Mudgee and Cowra ceased operating on 9.2.45. Some employees may be transferred to the St. Marys establishment.

Preference. The Government has announced as its policy a system of preference in employment to service personnel, and to civilians whose work has entailed actual contact with the enemy. Degrees of preference relating to nature of service are contemplated.

Wage Pegging. Wage pegging regulations were amended on Feb. 1, 1945. Hitherto only changes or anomalies arising prior to 10.2.42 could be taken into account as grounds for adjustment of wages, but now rates of pay may be altered in respect of changes in circumstances or anomalies whenever arising, including those which may have occurred between Feb., 1942 and Feb. 1945.

Shipbuilding. It has been disclosed that Australian yards have completed six 9,000 ton standard merchant vessels and another is to be delivered this month. From Aug., 1942 to Dec. 1944 merchant ships numbering 8,733 of 36.7 million tons had undergone repairs or heavy maintenance in Australia and in addition 1,243 merchant ships of 4.2 million tons had been dry docked or slipped. Work on naval ships was stated to have been of comparable dimensions.

Gold Mining. In N.S.W. the production of gold in 1944 was 62,610 oz. fine, valued at £657,112 compared with 63,779 oz. fine, valued at £666,490 in 1943.

EMPLOYMENT IN N.S.W. In November, 1944 there were 779,700 persons in civil employment in N.S.W. This was 4,300 more than in Nov. 1943, 4,000 more than in Oct., 1944, and the greatest number since December, 1941. From Oct. to Nov. 1944 males increased by 2,700 and females by 1,300; the number in Governmental employ rose by 800 (males + 900; females - 200) and in private employ the gain for the month of 3,300 comprised 1,800 males and 1,500 females.

Compared with November, 1943 there were 3,000 fewer persons (500 males and 2,500 females) employed by Governmental authorities, but private employers gained 7,300 of which 6,300 were men.

Notwithstanding the upward trend of recent months private employment remained 30,800 below the level at the outbreak of war in the Pacific, with 38,600 fewer men and 7,800 more women. Between Nov. 1941 and 1944 the Governmentally employed increased by 30,600, comprising 9,100 males and 21,500 females.

NEW SOUTH WALES.

Estimated Salary and Wage Earners Employed (Excluding Rural Workers and Household Domestic)
(Includes Civil Construction Corps in N.S.W.)

End of Month	MALES			FEMALES			TOTAL		
	Govt. (C'th.State Local and Allied).	Private Employ- ers.	Total	Govt. (C'th.State, Local and Allied)	Private Employ- ers.	Total	Govt. C'th.State Local and Allied)	Private Employ- ers.	Total
	'000	'000	'000	'000	'000	'000	'000	'000	'000
1939-July	136.5	383.4	529.9	19.4	148.6	168.0	155.9	542.0	697.9
1941-July	141.5	404.8	546.3	21.7	192.4	214.1	163.2	597.2	760.4
Nov.	144.3	411.1	555.4	23.0	201.5	224.5	167.3	612.6	779.9
1942-July	158.6	376.0	534.6	29.3	206.6	232.9	187.9	579.6	767.5
Nov.	156.7	374.7	531.4	33.9	206.9	240.8	190.6	581.6	772.2
1943-July	156.6	365.4	522.0	45.8	204.1	249.9	202.4	569.5	771.9
Aug.	155.9	364.9	520.8	46.5	205.0	251.5	202.4	569.9	772.3
Sept.	155.0	365.0	520.0	46.7	206.5	253.2	201.7	571.5	773.2
Oct.	154.9	364.9	519.8	46.8	207.9	254.7	201.7	572.8	774.5
Nov.	153.9	366.2	520.1	47.0	208.3	255.3	200.9	574.5	775.4
1944-July	152.4	369.7	522.1	45.5	206.1	251.6	197.9	575.8	773.7
Aug.	153.2	369.0	522.2	45.4	206.5	251.9	198.6	575.5	774.1
Sept.	154.2	369.4	523.6	44.4	207.3	251.7	198.6	576.7	775.3
Oct.	152.5	370.7	523.2	44.7	207.8	252.5	197.2	578.5	775.7
Nov.	153.4	372.5	525.9	44.5	209.3	253.8	197.9	581.8	779.7

After a check in October the downward trend in factory employment, which began a year earlier, was resumed in November, 1944 with losses of 700 males and 300 females, making the total reduction over the twelve months 10,900 (males 4,100, females 6,800). Though 1,800 men were added in Building and Construction in the last three months (500 in Nov.) the number employed was 2,300 fewer than in Nov., 1943.

Other groups experienced small increases during the month. In comparison with a year earlier employment in Transport and Communication was 5,300 greater. Retail Trade had gained 1,300 and Other Commerce and Finance 1,800 (mainly males) and in Professional and Personal Services there were 2,100 more men and 3,400 more women.

Comparative particulars are as follow:-

NEW SOUTH WALES.ESTIMATED TOTAL EMPLOYMENT IN MAIN INDUSTRIAL GROUPS.
Thousands.

Month	Factory		Mining & Quarrying		Building & Construction ★		Transport & Communication		Retail Trade		Other Commerce & Finance		Profession- al & Person- al Services. ø	
	M.	F.	M.	F.	M.	F.	M.	F.	M.	F.	M.	F.	M.	F.
1939-July	158.8	59.3					Not Available.							
1941-July	202.1	76.0	25.8	.2	53.6	.7	78.2	8.1	41.3	40.9	43.3	17.6	52.5	56.6
Nov.	210.5	80.7	25.8	.2	50.5	.7	79.8	8.4	41.5	42.9	44.6	19.4	52.6	58.0
1942-July	213.3	84.8	25.4	.2	44.2	.7	80.3	9.0	32.3	41.1	36.0	20.7	46.0	58.9
Nov.	214.9	89.3	25.3	.2	39.6	.7	79.9	9.9	30.4	41.2	36.4	21.2	44.2	60.2
1943-June	218.9	94.6	25.2	.2	31.1	.7	80.2	12.3	28.9	39.1	33.5	20.7	43.5	62.2
July	217.4	94.6	25.1	.2	29.9	.7	81.5	12.9	28.7	39.5	33.2	20.5	43.3	62.3
Aug.	217.5	95.3	25.0	.2	30.9	.7	80.2	13.2	28.5	38.1	33.6	20.8	43.4	62.7
Sept.	217.8	96.4	25.0	.2	29.9	.7	80.6	13.1	28.4	38.0	33.4	20.8	43.8	63.3
Oct.	217.9	96.5	25.1	.2	29.2	.7	80.8	13.2	28.3	38.0	33.4	20.9	43.9	64.3
Nov.	218.1	96.2	25.0	.2	29.1	.7	80.9	13.3	28.2	38.3	33.8	20.8	44.1	64.4
1944-June	216.5	90.5	24.4	.2	25.7	.7	84.4	13.8	28.6	37.3	34.5	20.3	45.1	65.4
July	216.2	90.9	24.4	.2	23.2	.8	84.1	13.9	28.4	37.2	34.2	20.4	45.4	65.7
Aug.	215.0	90.7	24.4	.2	25.0	.7	85.2	14.0	28.7	37.2	34.6	20.4	45.8	66.1
Sept.	214.0	90.2	24.7	.2	26.4	.7	85.4	14.0	28.6	37.3	35.1	20.8	45.9	66.7
Oct.	214.6	89.7	24.7	.2	26.3	.7	84.1	14.0	28.7	37.7	35.2	20.8	46.0	67.4
Nov.	213.9	89.4	24.8	.2	26.8	.7	85.6	14.0	29.1	38.7	35.6	20.8	46.2	67.8

TRANSPORT.

Railways. In December and the six months ended December of 1943 and 1944 the number of passengers carried varied little, but the quantity of goods carried was appreciably less this year. Train mileage has been curtailed by the shortage of coal, the peak in traffic in war goods appears to have been passed, and the drought has also affected the demand for trucks.

In the six months ended December, gross earnings and working expenses of the railways were each about 10% lower in 1944 than in 1943. The amount available toward payment of interest, etc. (£3,975,000) was less than in July-Dec. of any of the preceding three years, though greater than in 1939 or 1940.

N.S.W. GOVERNMENT RAILWAYS.

Year	Month of December.			Six months ended December.			
	Passenger Journeys	Goods and Livestock.	Gross Earnings	Passenger Journeys	Goods and Livestock.	Gross Earnings.	Net Earningsø
	millions	000 tons	£000	millions	000 tons	£000	£000
1939	15.1	1,362	1,909	89.1	8,468	10,521	3,478
1941	19.1	1,336	2,417	107.5	9,248	13,133	4,317
1941	19.9	1,587	2,851	116.2	10,038	17,278	4,682
1943	20.5	1,552	2,845	123.1	10,073	17,722	4,447
1944	20.7	1,480	2,664	123.8	9,617	16,000	3,975

ø Gross earnings less working expenses available to pay interest etc. on Railway Loan Debt.

Motor Vehicles. The use of motor vehicles continues to be limited by petrol rationing and the shortage of tyres. Because of a shortage of carbon black tyre production in 1945 is likely to be curtailed substantially.

The Glen Davis shale oil undertaking produced 4 m. gallons of crude oil and 1 m. gal. of petrol in 1944. By the end of 1945 it is expected that the originally planned production rate of 17 m. gal. of crude oil and petrol will be attained.

The Commonwealth Government is releasing additional used motor vehicles (including motor cycles) for sale to civilians through registered dealers as agents for the Disposals Commission. Maximum prices have been fixed for these vehicles.

During December, 1944 the number of motor vehicles on the register increased by 2,012, but the number of first registrations in that month averaged only 9 cars and 56 lorries and vans per week, and thus the increase was attributable mainly to recommissioning of laid-up vehicles.

In the calendar year the increase in all vehicles of 15,148 included 7,119 cars and 5,427 lorries and vans. These increases compare with a total increase of 9,197 (217 cars and 3,792 lorries and vans) in 1943 and a total decrease of 25,940 (cars 11,533; lorries and vans 4,233) in 1942.

Total registrations in December, 1944 (293,554) were within 10.9 per cent. of the number in August 1939 with cars 14.9 per cent. fewer and lorries and vans 3.7 per cent. greater in number than in the pre-war month.

MOTOR VEHICLES REGISTERED IN N.S.W.

Vehicles.	At end of month.			Increase.			
	Aug. 1939. ★	July, 1942. ø	Dec. 1944.	Sept., 1944.	Oct. 1944.	Nov. 1944.	Dec. 1944.
	000	000	000				
Cars	216.6	170.0	184.4	575	528	657	864
Lorries and Vans	77.6	70.9	80.5	446	463	512	578
All Vehicles	329.2	267.4	293.6	1,248	1,216	1,459	2,012

★ Pre-war peak. ø Lowest war-time number of cars.

BUILDING INDUSTRY.

Private Building Permits. Private building permits granted in Sydney and suburbs in December, 1944 were of a value of £157,549 compared with £186,513 in Nov., 1944 and £66,626 in Dec., 1943.

Restrictions upon building activity were progressively increased and took very severe form in July, 1942. Latterly a rather more liberal policy toward private home building has been adopted and in December Quarter, 1944 the value of permits granted by Local Government authorities (£495,420) exceeded that in any quarter since the last of 1941. In the year 1944 permits for houses (including alterations, etc.) totalled £297,000 compared with £83,000 in 1943.

PRIVATE BUILDING PERMITS GRANTED IN SYDNEY AND SUBURBS.

Quarter ended	1941.	1942.	1943.	1944.
	£	£	£	£
March	2,357,001	424,108	295,538	357,387
June	3,234,318	288,805	371,494	314,353
September	3,140,058	297,574	429,284	435,768
December	2,116,024	435,151	264,327	495,420
Year	10,847,401	1,445,638	1,360,643	1,602,928

Outside the Metropolis similar trends are apparent also the value in 129 industrial and rural towns and seven shires increasing from £97,000 in Dec.Qr. 1943 to £161,000 in Dec. Qr., 1944.

New Houses. Private permits for new houses in Sydney and Suburbs numbered 145 in Dec.Qr., 1944 compared with 107 in the preceding quarter and 19 in Dec.Qr.1943.

NUMBER OF PRIVATE PERMITS FOR NEW HOUSES - SYDNEY AND SUBURBS.

Year	Month of -						Quarter ended -			
	July	Aug.	Sept.	Oct.	Nov.	Dec.	Mar.	June	Sept.	Dec.
1942	1	6	7	4	8	4	201	1	14	16
1943	8	11	6	6	6	7	15	24	25	19
1944	33	42	32	42	52	51	40	59	107	145

In the remainder of N.S.W. (as far as recorded) the number increased from 93 in Dec. Qr. 1943 and 191 in Sept. Qr., 1944 to 228 in Dec.Qr. 1944.

Government constructed housing is also developing, as the following statement illustrates:-

NO. OF NEW DWELLINGS AUTHORISED OR CONTRACTED FOR ON GOVERNMENT ACCOUNT IN N.S.W.

Year	Month of -						Quarter ended -			
	July	Aug.	Sept.	Oct.	Nov.	Dec.	Mar.	June	Sept.	Dec.
1942	417	71	45	...	120	70	33	114	533	190
1943	59	32	7	2	...	1	134	106	98	3
1944	...	202	47	69	76	121	5	79	249	266

Total Building. The slight relaxation of restriction on private building has been made possible by an appreciable decrease in Government building projects. The value of these authorised or contracted for in December, 1944 was £191,000 compared with £483,000 and £553,000 in Dec. 1942 and 1943, respectively. Annual totals were £4.48 m. in 1942, £4.32 m. in 1943 and £2.85 m. in 1944.

The following table brings together the available data concerning private and Governmental building activity in N.S.W. in each of the last five years. From this it will be seen that the total recorded value in 1944 (£5.32 m.) was less than in either 1942 or 1943 (private building having failed to expand sufficiently to offset the decrease in public construction) and in that year was little more than one-fourth the value in 1941 or 1942.

NEW BUILDINGS, ALTERATIONS, AND ADDITIONS N.S.W.
(Government and Private (as far as recorded).)

Year	Private Building Permits		Govt. Building Projects		Total		
	Sydney and Suburbs	Other N.S.W. (as far as recorded)	Sydney and Suburbs	Balance of State	Sydney and Suburbs.	Other N.S.W. (as far as recorded)	Total recorded.
	£000	£000	£000	£000	£000	£000	£000
1940	11,718	4,887	894	2,672	12,612	7,559	20,171
1941	10,847	4,758	1,725	2,894	12,572	7,652	20,224
1942	1,446	1,079	1,371	3,106	2,817	4,185	7,002
1943	1,361	508	3,109	1,211	4,470	1,719	6,189
1944	1,603	867	1,757	1,093	3,360	1,960	5,320